



UConn | UNIVERSITY OF
CONNECTICUT

University of Connecticut

Approving Smart HR Transactions

Overview Once a Smart HR transaction is submitted by the Department Processor or HR Workforce Solutions, it is routed to the Department Approver to be reviewed and approved. Smart HR transactions pending approval will route to Department Approvers in the following ways:

- An email will be sent to the Department Approver notifying of the transaction pending approval
- The pending transaction will route to the Department Approver's Worklist via workflow
- The pending transaction will be available for review and approval on the Manage Transactions page

In each scenario, the Department Approvers will navigate to the **Manage Transactions** page to review and approve Smart HR transactions. After a Smart HR transaction is approved by the Department Approver, it is routed to the Payroll Department to finalize the transaction in Job Data.

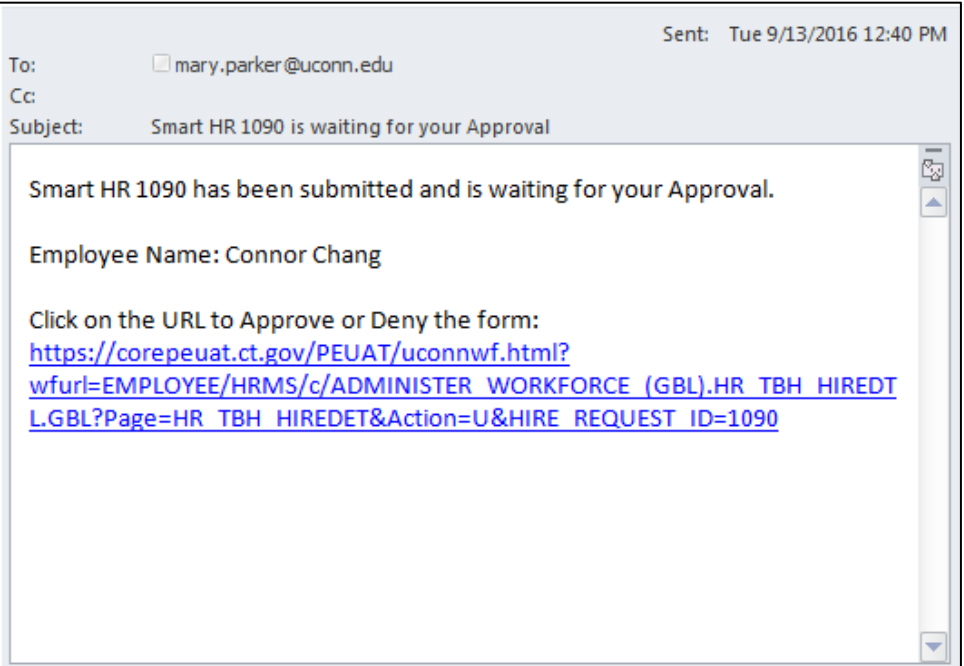
Department Approvers will use this job aid to learn the steps to approve a Smart HR transaction using three methods:

- Approval via the email notification
- Approval via the Worklist
- Approval via the Manage Transactions page

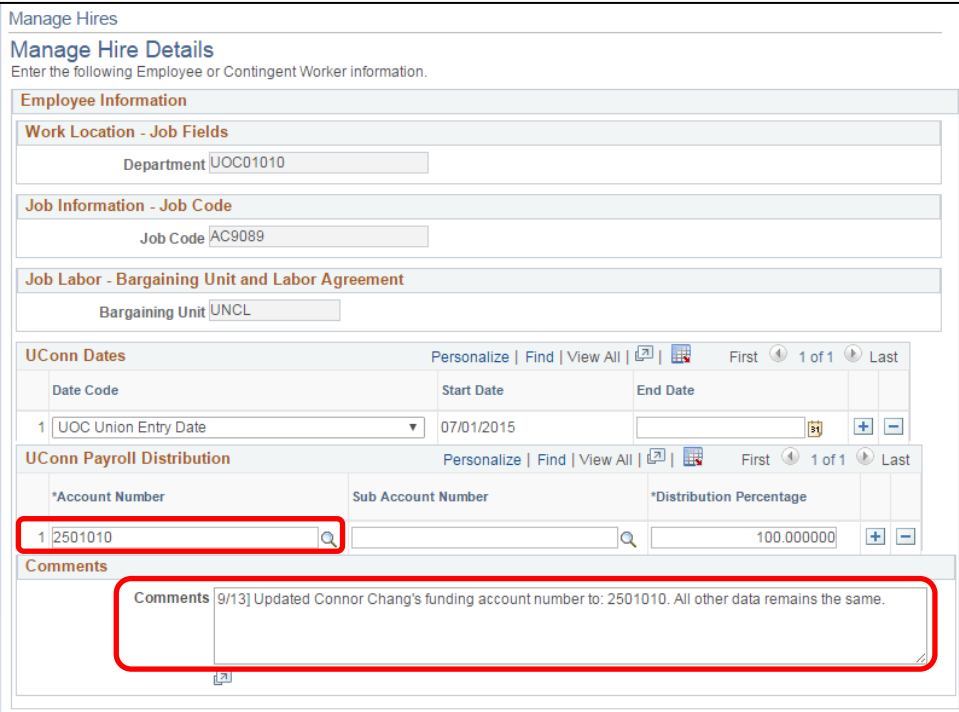
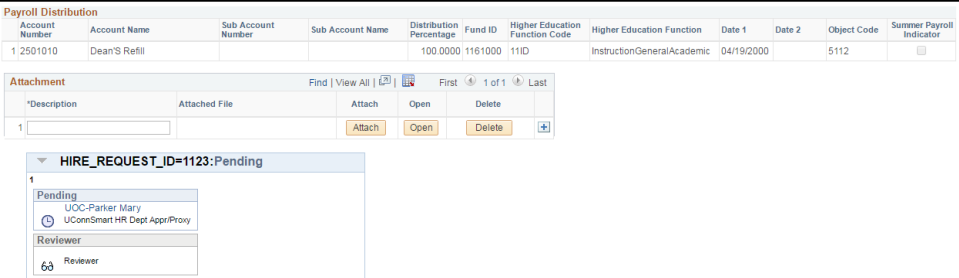
In each example, **Jessica King**, a Department Processor, has submitted a funding change template to **Mary Parker**, a Department Approver, for **Connor Chang**, an unclassified employee in the **Athletics** department.

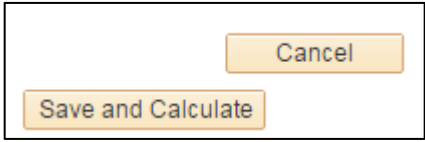
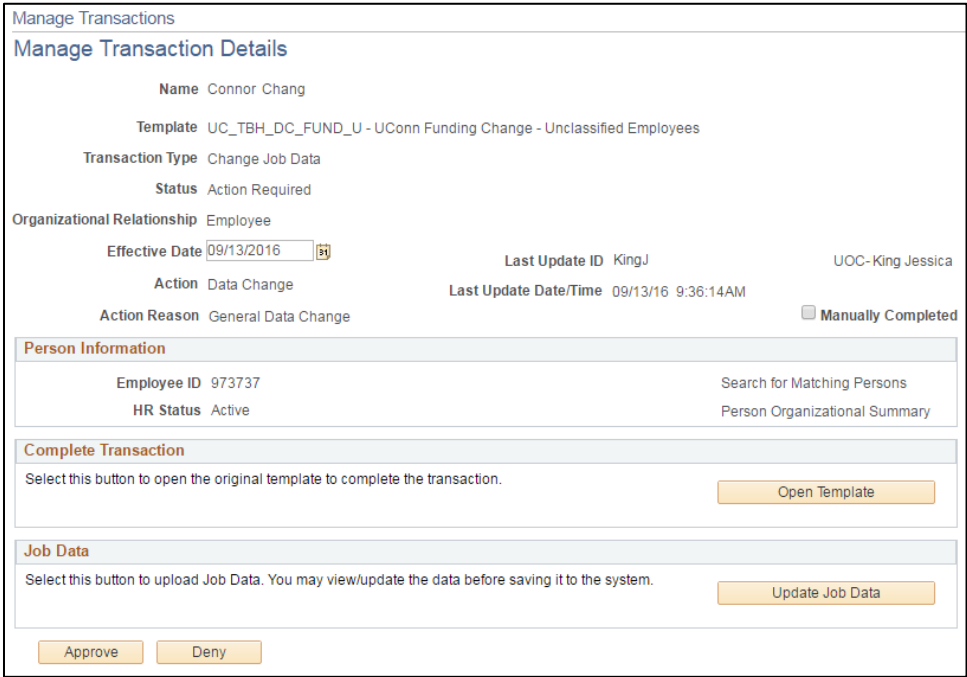
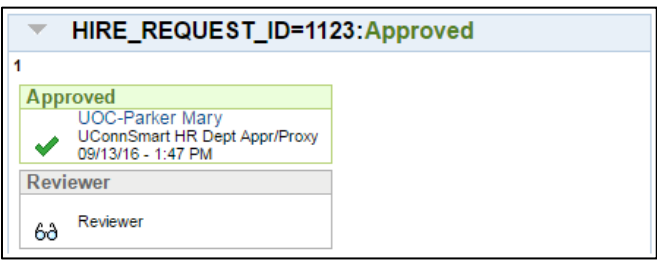
Process Steps: Smart HR Approval through an Email Notification

Recommended Use: Department Approvers should use this approval method to immediately approve transactions that have been routed to them for approval. Each transaction that is submitted for approval will be sent in a separate email, so Department Approvers that approve a large quantity of transactions may turn off this feature.

| Step | Action | Screenshot |
|------|--|---|
| 1 | <p>Once a Smart HR transaction is submitted for approval, the Department Approver will receive an email notification to approve the pending transaction.</p> <p>Click on the URL provided in the email to open the Smart HR template.</p> <p>Note: If you are already logged in to Core-CT, you will be sent directly to the approval page. If you are <u>not</u> already logged in to Core-CT, you will be directed to log in via the NetID Single Sign On page.</p> |  <p>The screenshot shows an email interface with the following details:</p> <ul style="list-style-type: none"> To: <input type="checkbox"/> mary.parker@uconn.edu Cc: Subject: Smart HR 1090 is waiting for your Approval Sent: Tue 9/13/2016 12:40 PM Body: <ul style="list-style-type: none"> Smart HR 1090 has been submitted and is waiting for your Approval. Employee Name: Connor Chang Click on the URL to Approve or Deny the form: https://corepeuat.ct.gov/PEUAT/uconnwf.html?wfurl=EMPLOYEE/HRMS/c/ADMINISTER_WORKFORCE_(GBL).HR_TBH_HIREDTL.GBL?Page=HR_TBH_HIREDT&Action=U&HIRE_REQUEST_ID=1090 |

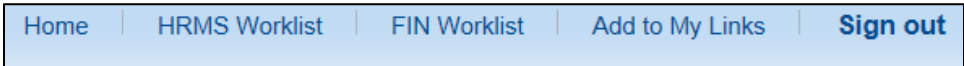
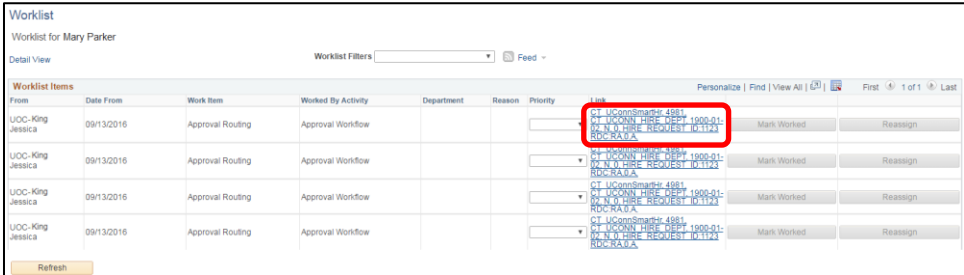
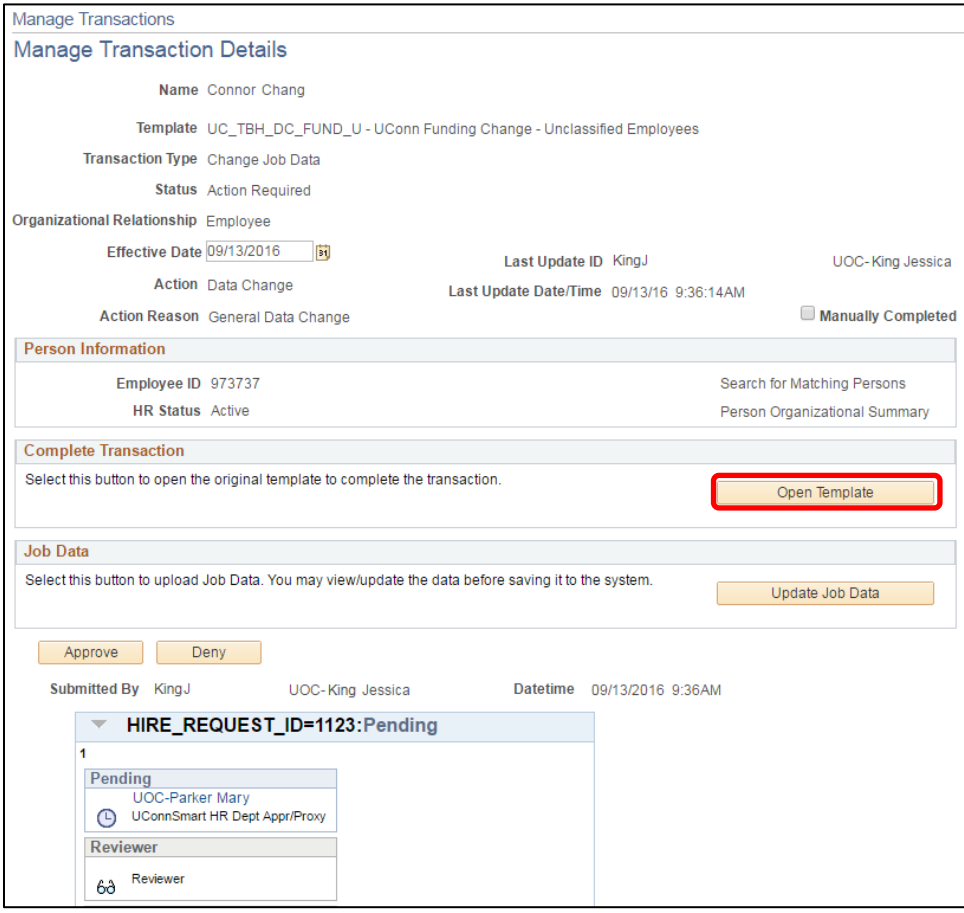
| Step | Action | Screenshot |
|------|---|--|
| 2 | <p>On the Manage Transactions page, the Department Approver can view details about the transaction including:</p> <ul style="list-style-type: none"> • The employee’s Name • The Smart HR Template • The current Status • The Effective Date of the transaction • Who last updated the template by Last Update ID • The employee’s Person Information <p>Click Open Template to review the new information submitted on the template.</p> | <p>Manage Transactions</p> <h3>Manage Transaction Details</h3> <p>Name Connor Chang</p> <p>Template UC_TBH_DC_FUND_U - UConn Funding Change - Unclassified Employees</p> <p>Transaction Type Change Job Data</p> <p>Status Action Required</p> <p>Organizational Relationship Employee</p> <p>Effective Date 09/13/2016</p> <p>Last Update ID KingJ UOC-King Jessica</p> <p>Action Data Change Last Update Date/Time 09/13/16 9:36:14AM</p> <p>Action Reason General Data Change <input type="checkbox"/> Manually Completed</p> <hr/> <p>Person Information</p> <p>Employee ID 973737 Search for Matching Persons</p> <p>HR Status Active Person Organizational Summary</p> <hr/> <p>Complete Transaction</p> <p>Select this button to open the original template to complete the transaction.</p> <p>Open Template</p> <hr/> <p>Job Data</p> <p>Select this button to upload Job Data. You may view/update the data before saving it to the system.</p> <p>Update Job Data</p> <hr/> <p>Approve Deny</p> <p>Submitted By KingJ UOC-King Jessica Datetime 09/13/2016 9:36AM</p> <p>HIRE_REQUEST_ID=1123:Pending</p> <p>1</p> <p>Pending</p> <p>UOC-Parker Mary</p> <p>UConnSmart HR Dept Appr/Proxy</p> <p>Reviewer</p> <p>Reviewer</p> |
| 3 | <p>On the Manage Hires page, review the transactions details submitted on the template:</p> <ul style="list-style-type: none"> • Name • Status • Template • Employee ID • Employee Record Number • Job Effective Date <p>Click Continue to review the funding change template.</p> <p>Note: This is not a hire transaction. The page is called Manage Hires for all Smart HR transactions.</p> | <p>Manage Hires</p> <h3>Manage Hire Details</h3> <p>Name Connor Chang Status Submitted</p> <p>The following transaction details are required.</p> <p>Template UConn Funding Change - Unclassified Employees</p> <p>*Employee ID 973737 Connor Chang</p> <p>*Employment Record Number 0 (UCP 09-Asst Finance Dir 2)</p> <p>*Job Effective Date 09/13/2016</p> <p>Action Data Change</p> <p>Reason Code General Data Change</p> <p>Continue Cancel</p> |

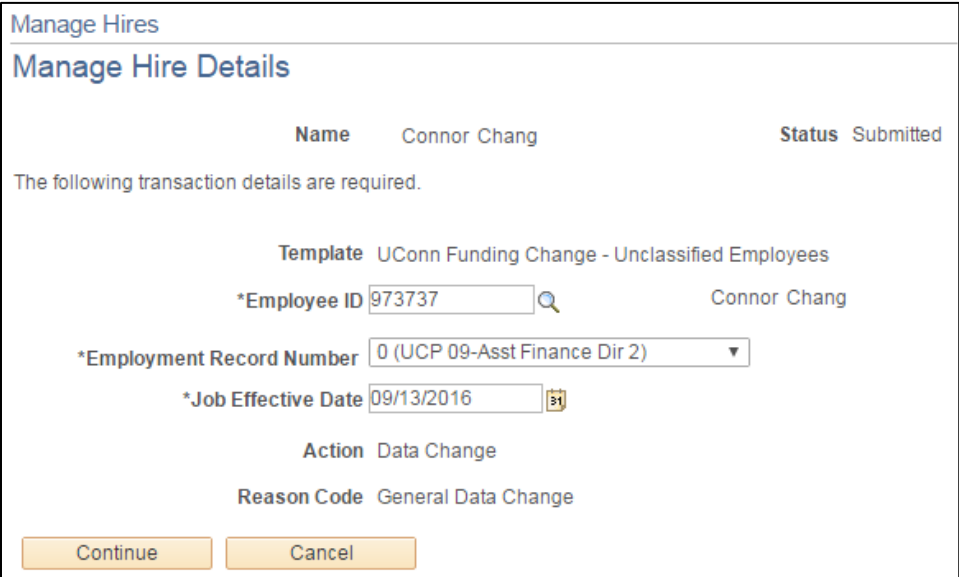
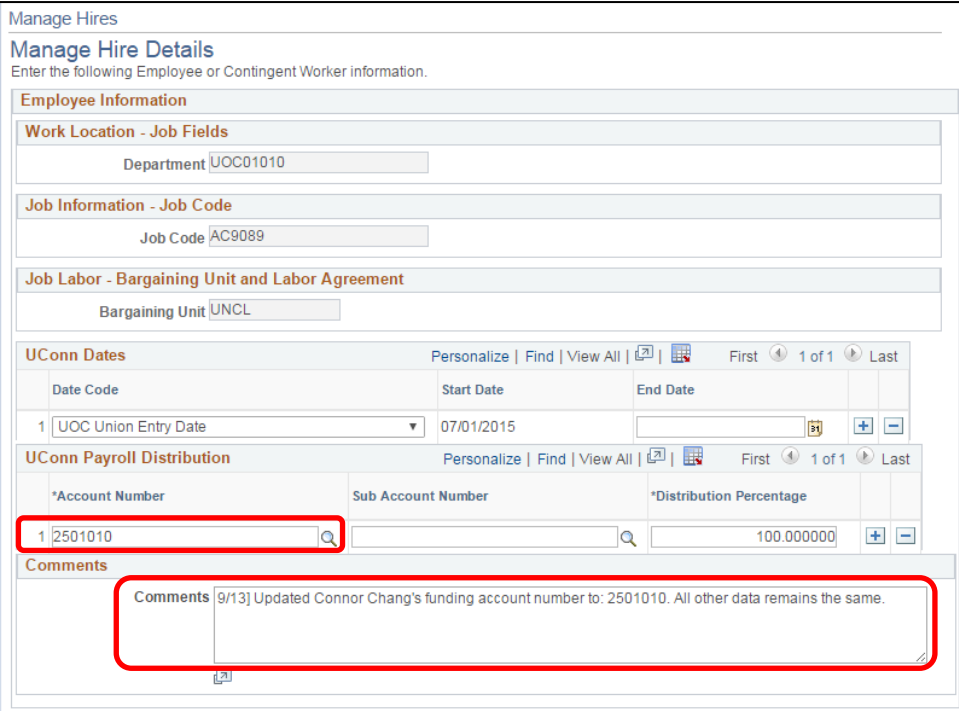
| Step | Action | Screenshot |
|------|---|--|
| 4 | <p>Many fields on Smart HR templates are read-only and cannot be updated. In this example, the Department, Job Code and Bargaining Unit fields are read-only.</p> <p>On the Smart HR template, review the applicable information. In this example, the Department Processor submitted a funding change template. Review the updated Account Number.</p> <p>Note: Department Processors may leave comments to the Department Approvers notifying them what data has been updated or added.</p> |  |
| 5 | <p>Scroll to the bottom of the template to review additional information.</p> <p>In this example, the Department Approver can view additional information about the new funding account under the Payroll Distribution section.</p> <p>An Attachment section is available on all Smart HR templates. If the Department Processor included an attachment on the template, click Open to view the attachment. In this example, no documents have been attached.</p> <p>The Department Approver can also view who the transaction was routed to for approval.</p> |  |

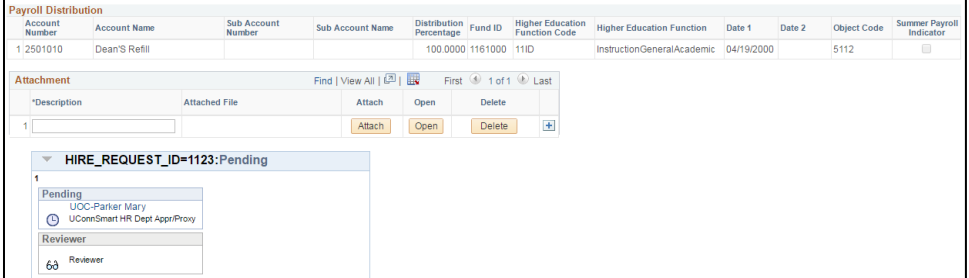
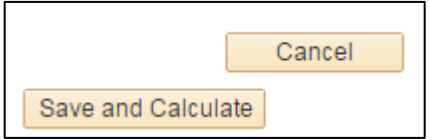
| Step | Action | Screenshot |
|------|---|--|
| 6 | <p>If the Department Approver has made any updates to the submitted template, click Save and Calculate to save the updates. Then click Cancel to return to the Manage Transactions page. The Cancel button does not cancel the transaction, but instead acts as a “back” button. <u>Do not</u> click the back button in the browser to return to the Manage Transactions page.</p> <p>If the Department Approver has <u>not</u> made any updates to the template and is ready to approve, click Cancel.</p> |  |
| 7 | <p>Back on the Manage Transactions page, the Department Approver is ready to take action on the transaction:</p> <ul style="list-style-type: none"> • Approve: Click the Approve button to approve the Smart HR transaction. • Deny: Click the Deny button to deny the Smart HR transaction. Once denied, the template cannot be reopened. The Department Processor will need to submit a new template if updates to the employee’s data still need to be made. |  |
| 8 | <p>Once the Smart HR template is approved by the Department Approver, the transaction status will change from <i>Pending</i> to <i>Approved</i>.</p> <p>The approved transaction is sent to the Payroll Department to be finalized in Job Data, and will be effective as of the Effective Date denoted in the template.</p> |  |

Process Steps: Smart HR Approval through the Worklist

Recommended Use: Department Approvers should use this approval method if they have multiple Smart HR transactions pending their approval. The Worklist is a prioritized list of work items that Approvers need to take action on, and can be access via the Core-CT home page. **Note:** The Worklist is unique to each employee and may include more than just Smart HR transactions pending approval, depending on the employee’s job responsibilities.

| Step | Action | Screenshot |
|------|---|--|
| 1 | Navigate to the Worklist: HRMS Worklist from the home page. |  |
| 2 | The Worklist displays all transactions pending the Department Approver’s approval. In this example, the Department Approver has four transactions pending action. Click the Link to the applicable transaction to open the Manage Transactions page. |  |
| 3 | On the Manage Transactions page, the Department Approver can view details about the transaction including: <ul style="list-style-type: none"> • The employee’s Name • The Smart HR Template • The current Status • The Effective Date of the transaction • Who last updated the template by Last Update ID • The employee’s Person Information Click Open Template to review the new information submitted on the template. |  |

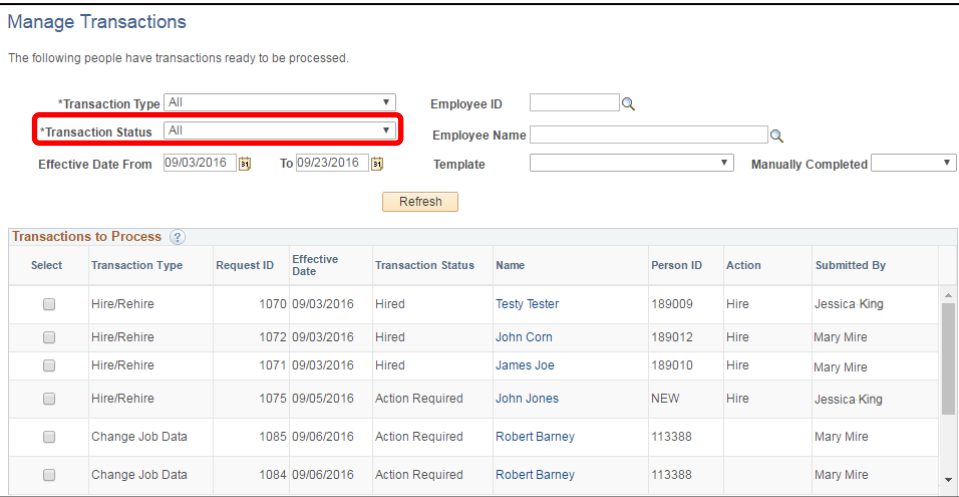
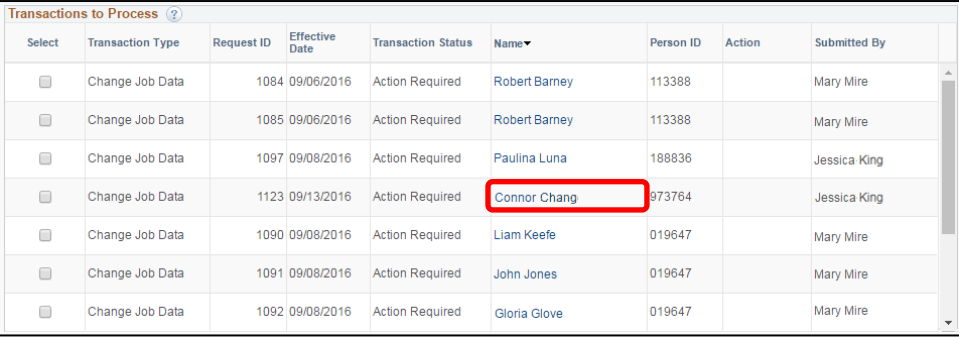
| Step | Action | Screenshot |
|------|--|---|
| 4 | <p>On the Manage Hires page, review the transactions details submitted on the template:</p> <ul style="list-style-type: none"> • Name • Status • Template • Employee ID • Employee Record Number • Job Effective Date <p>Click Continue to review the funding change template.</p> <p>Note: This is not a hire transaction. The page is called Manage Hires for all Smart HR transactions.</p> |  |
| 5 | <p>Many fields on Smart HR templates are read-only and cannot be updated. In this example, the Department, Job Code and Bargaining Unit fields are read-only.</p> <p>On the Smart HR template, review the applicable information. In this example, the Department Processor submitted a funding change template. Review the updated Account Number.</p> <p>Note: Department Processors may leave comments to the Department Approvers notifying them what data has been updated or added.</p> |  |

| Step | Action | Screenshot |
|------|---|---|
| 6 | <p>Scroll to the bottom of the template to review additional information.</p> <p>In this example, the Department Approver can view additional information about the new funding account under the Payroll Distribution section.</p> <p>An Attachment section is available on all Smart HR templates. If the Department Processor included an attachment on the template, click Open to view the attachment. In this example, no documents have been attached.</p> <p>The Department Approver can also view who the transaction was routed to for approval.</p> |  |
| 7 | <p>If the Department Approver has made any updates to the submitted template, click Save and Calculate to save the updates. Then click Cancel to return to the Manage Transactions page. The Cancel button does not cancel the transaction, but instead acts as a “back” button. <u>Do not</u> click the back button in the browser to return to the Manage Transactions page.</p> <p>If the Department Approver has <u>not</u> made any updates to the template and is ready to approve, click Cancel.</p> |  |

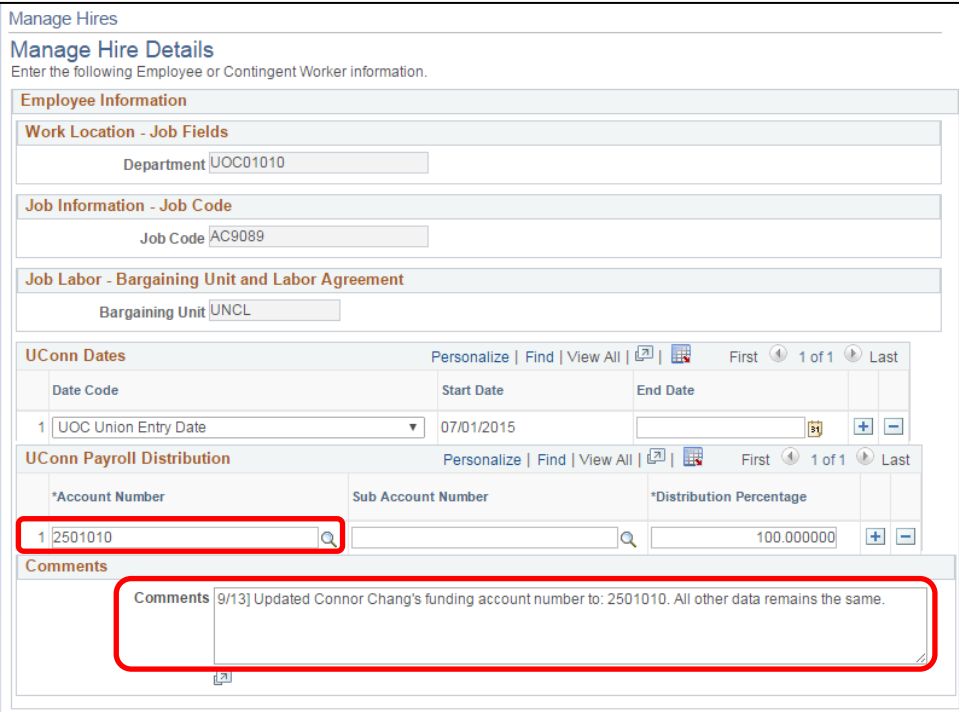
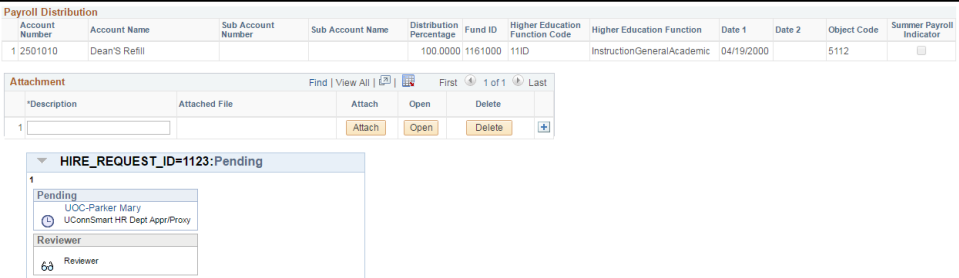
| Step | Action | Screenshot | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|------------------|--|--|--------------------|------------|-----------|--------------------|------------------|-------------|----------|------|--------|------------------|------------|----------------------|-------------------|--|--|--|------------------|-------------|------------------|------------|------------------|-------------------|--|--|--|------------------|-------------|------------------|------------|------------------|-------------------|--|--|--|------------------|-------------|------------------|------------|------------------|-------------------|--|--|--|------------------|-------------|
| 8 | <p>Back on the Manage Transactions page, the Department Approver is ready to take action on the transaction:</p> <ul style="list-style-type: none"> • Approve: Click the Approve button to approve the Smart HR transaction. • Deny: Click the Deny button to deny the Smart HR transaction. Once denied, the template cannot be reopened. The Department Processor will need to submit a new template if updates to the employee's data still need to be made. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 9 | <p>Once the Smart HR template is approved by the Department Approver, the transaction status will change from <i>Pending</i> to <i>Approved</i>.</p> <p>The approved transaction is sent to the Payroll Department to be finalized in Job Data, and will be effective as of the Effective Date denoted in the template.</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 10 | <p>When the Department Approver navigates back to the Worklist, the status for that transaction will update to <i>Transaction Approved</i>. The Department Approver can continue to click each Link to review and approve each transaction.</p> <p>Click Mark Worked to remove the approved transaction from the Worklist.</p> | <table border="1"> <thead> <tr> <th>From</th> <th>Date From</th> <th>Work Item</th> <th>Worked By Activity</th> <th>Department</th> <th>Reason</th> <th>Priority</th> <th>Link</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>UOC-King Jessica</td> <td>09/13/2016</td> <td>Transaction Approved</td> <td>Approval Workflow</td> <td></td> <td></td> <td></td> <td>UOC-King Jessica</td> <td>Mark Worked</td> </tr> <tr> <td>UOC-King Jessica</td> <td>09/13/2016</td> <td>Approval Routing</td> <td>Approval Workflow</td> <td></td> <td></td> <td></td> <td>UOC-King Jessica</td> <td>Mark Worked</td> </tr> <tr> <td>UOC-King Jessica</td> <td>09/13/2016</td> <td>Approval Routing</td> <td>Approval Workflow</td> <td></td> <td></td> <td></td> <td>UOC-King Jessica</td> <td>Mark Worked</td> </tr> <tr> <td>UOC-King Jessica</td> <td>09/13/2016</td> <td>Approval Routing</td> <td>Approval Workflow</td> <td></td> <td></td> <td></td> <td>UOC-King Jessica</td> <td>Mark Worked</td> </tr> </tbody> </table> | From | Date From | Work Item | Worked By Activity | Department | Reason | Priority | Link | Action | UOC-King Jessica | 09/13/2016 | Transaction Approved | Approval Workflow | | | | UOC-King Jessica | Mark Worked | UOC-King Jessica | 09/13/2016 | Approval Routing | Approval Workflow | | | | UOC-King Jessica | Mark Worked | UOC-King Jessica | 09/13/2016 | Approval Routing | Approval Workflow | | | | UOC-King Jessica | Mark Worked | UOC-King Jessica | 09/13/2016 | Approval Routing | Approval Workflow | | | | UOC-King Jessica | Mark Worked |
| From | Date From | Work Item | Worked By Activity | Department | Reason | Priority | Link | Action | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| UOC-King Jessica | 09/13/2016 | Transaction Approved | Approval Workflow | | | | UOC-King Jessica | Mark Worked | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| UOC-King Jessica | 09/13/2016 | Approval Routing | Approval Workflow | | | | UOC-King Jessica | Mark Worked | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| UOC-King Jessica | 09/13/2016 | Approval Routing | Approval Workflow | | | | UOC-King Jessica | Mark Worked | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| UOC-King Jessica | 09/13/2016 | Approval Routing | Approval Workflow | | | | UOC-King Jessica | Mark Worked | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

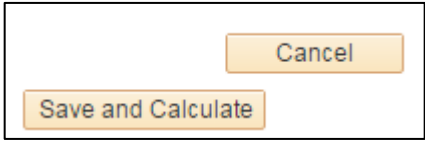
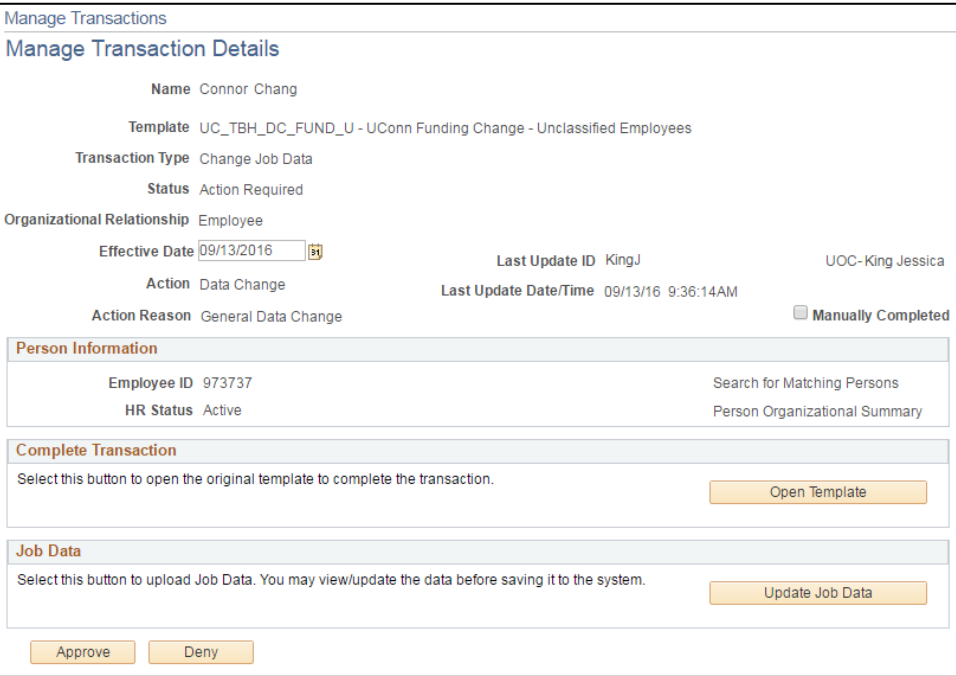
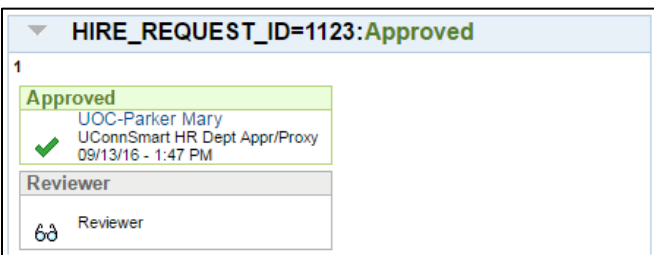
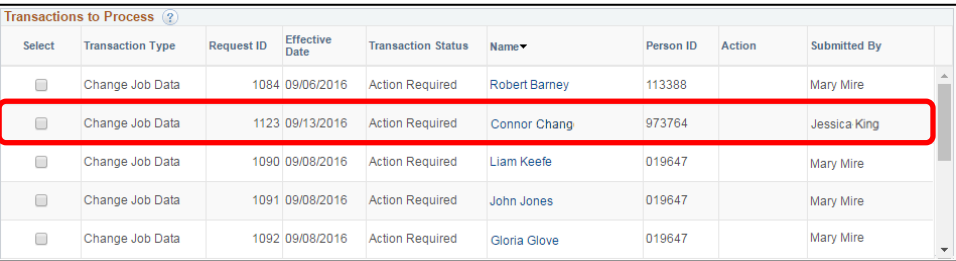
Process Steps: Smart HR Approval through the Manage Transactions page

Recommended Use: The Manage Transactions page can be used to view all transactions under a department organization hierarchy – not just those pending action from the specific Department Approver. Department Approvers who share the responsibility of approving Smart HR transactions with other Department Approvers within their department should use this page to better understand all transactions occurring within their department.

| Step | Action | Screenshot | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--------------------------|--|--|----------------|--------------------|---------------|----------------|--------------------|--------------|-----------|--------|--------------|--------------------------|-----------------|------|------------|-----------------|---------------|--------|------|--------------|--------------------------|-----------------|------|------------|-----------------|---------------|--------|------|-----------|--------------------------|-----------------|------|------------|-----------------|--------------|--------|------|--------------|--------------------------|-----------------|------|------------|-----------------|--------------|--------|------|--------------|--------------------------|-----------------|------|------------|-----------------|---------------|--------|--|-----------|--------------------------|-----------------|------|------------|-----------------|---------------|--------|--|-----------|--------------------------|-----------------|------|------------|-----------------|--------------|--------|--|-----------|
| 1 | Navigate to the Manage Transactions page: Main Menu > Core-CT HRMS > Workforce Administration > Smart HR Template > Manage Transactions | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2 | <p>The Manage Transactions page displays all transactions occurring within a department.</p> <p>To review transactions that are pending approval, filter the Transaction Status to <i>Action Required</i>. Then click Refresh.</p> <p>Note: Department Approvers may need to update the Effective Date From and To if the effective date of the transaction is outside of the defaulted dates.</p> |  <p>The screenshot shows the 'Manage Transactions' interface. At the top, there are filters for Transaction Type (set to 'All'), Transaction Status (set to 'All'), Effective Date From (09/03/2016), and Effective Date To (09/23/2016). There are also search fields for Employee ID and Employee Name, and a 'Refresh' button. Below the filters is a table titled 'Transactions to Process' with columns: Select, Transaction Type, Request ID, Effective Date, Transaction Status, Name, Person ID, Action, and Submitted By. The table contains several rows, with the 'Action Required' status highlighted in blue.</p> <table border="1" data-bbox="570 810 1523 1077"> <thead> <tr> <th>Select</th> <th>Transaction Type</th> <th>Request ID</th> <th>Effective Date</th> <th>Transaction Status</th> <th>Name</th> <th>Person ID</th> <th>Action</th> <th>Submitted By</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Hire/Rehire</td> <td>1070</td> <td>09/03/2016</td> <td>Hired</td> <td>Testy Tester</td> <td>189009</td> <td>Hire</td> <td>Jessica King</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Hire/Rehire</td> <td>1072</td> <td>09/03/2016</td> <td>Hired</td> <td>John Corn</td> <td>189012</td> <td>Hire</td> <td>Mary Mire</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Hire/Rehire</td> <td>1071</td> <td>09/03/2016</td> <td>Hired</td> <td>James Joe</td> <td>189010</td> <td>Hire</td> <td>Mary Mire</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Hire/Rehire</td> <td>1075</td> <td>09/05/2016</td> <td>Action Required</td> <td>John Jones</td> <td>NEW</td> <td>Hire</td> <td>Jessica King</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Change Job Data</td> <td>1085</td> <td>09/06/2016</td> <td>Action Required</td> <td>Robert Barney</td> <td>113388</td> <td></td> <td>Mary Mire</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Change Job Data</td> <td>1084</td> <td>09/06/2016</td> <td>Action Required</td> <td>Robert Barney</td> <td>113388</td> <td></td> <td>Mary Mire</td> </tr> </tbody> </table> | Select | Transaction Type | Request ID | Effective Date | Transaction Status | Name | Person ID | Action | Submitted By | <input type="checkbox"/> | Hire/Rehire | 1070 | 09/03/2016 | Hired | Testy Tester | 189009 | Hire | Jessica King | <input type="checkbox"/> | Hire/Rehire | 1072 | 09/03/2016 | Hired | John Corn | 189012 | Hire | Mary Mire | <input type="checkbox"/> | Hire/Rehire | 1071 | 09/03/2016 | Hired | James Joe | 189010 | Hire | Mary Mire | <input type="checkbox"/> | Hire/Rehire | 1075 | 09/05/2016 | Action Required | John Jones | NEW | Hire | Jessica King | <input type="checkbox"/> | Change Job Data | 1085 | 09/06/2016 | Action Required | Robert Barney | 113388 | | Mary Mire | <input type="checkbox"/> | Change Job Data | 1084 | 09/06/2016 | Action Required | Robert Barney | 113388 | | Mary Mire | | | | | | | | | |
| Select | Transaction Type | Request ID | Effective Date | Transaction Status | Name | Person ID | Action | Submitted By | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Hire/Rehire | 1070 | 09/03/2016 | Hired | Testy Tester | 189009 | Hire | Jessica King | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Hire/Rehire | 1072 | 09/03/2016 | Hired | John Corn | 189012 | Hire | Mary Mire | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Hire/Rehire | 1071 | 09/03/2016 | Hired | James Joe | 189010 | Hire | Mary Mire | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Hire/Rehire | 1075 | 09/05/2016 | Action Required | John Jones | NEW | Hire | Jessica King | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Change Job Data | 1085 | 09/06/2016 | Action Required | Robert Barney | 113388 | | Mary Mire | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Change Job Data | 1084 | 09/06/2016 | Action Required | Robert Barney | 113388 | | Mary Mire | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3 | Once the transactions are filtered, click on the Name of the employee to open the Manage Transactions page for that specific Smart HR transaction. |  <p>The screenshot shows a filtered view of the 'Transactions to Process' table. The 'Name' column is sorted, and the row for 'Connor Chang' is highlighted with a red box. The other rows in the table are for 'Robert Barney', 'Paulina Luna', 'Liam Keefe', 'John Jones', and 'Gloria Glove'.</p> <table border="1" data-bbox="570 1161 1523 1497"> <thead> <tr> <th>Select</th> <th>Transaction Type</th> <th>Request ID</th> <th>Effective Date</th> <th>Transaction Status</th> <th>Name</th> <th>Person ID</th> <th>Action</th> <th>Submitted By</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Change Job Data</td> <td>1084</td> <td>09/06/2016</td> <td>Action Required</td> <td>Robert Barney</td> <td>113388</td> <td></td> <td>Mary Mire</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Change Job Data</td> <td>1085</td> <td>09/06/2016</td> <td>Action Required</td> <td>Robert Barney</td> <td>113388</td> <td></td> <td>Mary Mire</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Change Job Data</td> <td>1097</td> <td>09/08/2016</td> <td>Action Required</td> <td>Paulina Luna</td> <td>188836</td> <td></td> <td>Jessica King</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Change Job Data</td> <td>1123</td> <td>09/13/2016</td> <td>Action Required</td> <td>Connor Chang</td> <td>973764</td> <td></td> <td>Jessica King</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Change Job Data</td> <td>1090</td> <td>09/08/2016</td> <td>Action Required</td> <td>Liam Keefe</td> <td>019647</td> <td></td> <td>Mary Mire</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Change Job Data</td> <td>1091</td> <td>09/08/2016</td> <td>Action Required</td> <td>John Jones</td> <td>019647</td> <td></td> <td>Mary Mire</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Change Job Data</td> <td>1092</td> <td>09/08/2016</td> <td>Action Required</td> <td>Gloria Glove</td> <td>019647</td> <td></td> <td>Mary Mire</td> </tr> </tbody> </table> | Select | Transaction Type | Request ID | Effective Date | Transaction Status | Name | Person ID | Action | Submitted By | <input type="checkbox"/> | Change Job Data | 1084 | 09/06/2016 | Action Required | Robert Barney | 113388 | | Mary Mire | <input type="checkbox"/> | Change Job Data | 1085 | 09/06/2016 | Action Required | Robert Barney | 113388 | | Mary Mire | <input type="checkbox"/> | Change Job Data | 1097 | 09/08/2016 | Action Required | Paulina Luna | 188836 | | Jessica King | <input type="checkbox"/> | Change Job Data | 1123 | 09/13/2016 | Action Required | Connor Chang | 973764 | | Jessica King | <input type="checkbox"/> | Change Job Data | 1090 | 09/08/2016 | Action Required | Liam Keefe | 019647 | | Mary Mire | <input type="checkbox"/> | Change Job Data | 1091 | 09/08/2016 | Action Required | John Jones | 019647 | | Mary Mire | <input type="checkbox"/> | Change Job Data | 1092 | 09/08/2016 | Action Required | Gloria Glove | 019647 | | Mary Mire |
| Select | Transaction Type | Request ID | Effective Date | Transaction Status | Name | Person ID | Action | Submitted By | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Change Job Data | 1084 | 09/06/2016 | Action Required | Robert Barney | 113388 | | Mary Mire | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Change Job Data | 1085 | 09/06/2016 | Action Required | Robert Barney | 113388 | | Mary Mire | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Change Job Data | 1097 | 09/08/2016 | Action Required | Paulina Luna | 188836 | | Jessica King | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Change Job Data | 1123 | 09/13/2016 | Action Required | Connor Chang | 973764 | | Jessica King | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Change Job Data | 1090 | 09/08/2016 | Action Required | Liam Keefe | 019647 | | Mary Mire | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Change Job Data | 1091 | 09/08/2016 | Action Required | John Jones | 019647 | | Mary Mire | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Change Job Data | 1092 | 09/08/2016 | Action Required | Gloria Glove | 019647 | | Mary Mire | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| Step | Action | Screenshot |
|------|---|---|
| 4 | <p>On the Manage Transactions page, the Department Approver can view details about the transaction including:</p> <ul style="list-style-type: none"> • The employee’s Name • The Smart HR Template • The current Status • The Effective Date of the transaction • Who last updated the template by Last Update ID • The employee’s Person Information <p>Click Open Template to review the new information submitted on the template.</p> | <p>The screenshot shows the 'Manage Transaction Details' page. At the top, it displays the Name (Connor Chang), Template (UC_TBH_DC_FUND_U - UConn Funding Change - Unclassified Employees), Transaction Type (Change Job Data), and Status (Action Required). Below this, it shows Organizational Relationship (Employee), Effective Date (09/13/2016), Last Update ID (KingJ), and Last Update Date/Time (09/13/16 9:36:14AM). There are also buttons for 'Approve' and 'Deny'. A section titled 'Person Information' shows Employee ID 973737 and HR Status Active. A red box highlights the 'Open Template' button. At the bottom, there is a dropdown menu for 'HIRE_REQUEST_ID=1123:Pending' showing a 'Pending' status and a reviewer.</p> |
| 5 | <p>On the Manage Hires page, review the transactions details submitted on the template:</p> <ul style="list-style-type: none"> • Name • Status • Template • Employee ID • Employee Record Number • Job Effective Date <p>Click Continue to review the funding change template.</p> <p>Note: This is not a hire transaction. The page is called Manage Hires for all Smart HR transactions.</p> | <p>The screenshot shows the 'Manage Hire Details' page. It displays the Name (Connor Chang) and Status (Submitted). Below this, it shows the Template (UConn Funding Change - Unclassified Employees), Employee ID (973737), Employment Record Number (0 (UCP 09-Asst Finance Dir 2)), and Job Effective Date (09/13/2016). The Action is Data Change and the Reason Code is General Data Change. At the bottom, there are 'Continue' and 'Cancel' buttons.</p> |

| Step | Action | Screenshot |
|------|---|--|
| 6 | <p>Many fields on Smart HR templates are read-only and cannot be updated. In this example, the Department, Job Code and Bargaining Unit fields are read-only.</p> <p>On the Smart HR template, review the applicable information. In this example, the Department Processor submitted a funding change template. Review the updated Account Number.</p> <p>Note: Department Processors may leave comments to the Department Approvers notifying them what data has been updated or added.</p> |  |
| 7 | <p>Scroll to the bottom of the template to review additional information.</p> <p>In this example, the Department Approver can view additional information about the new funding account under the Payroll Distribution section.</p> <p>An Attachment section is available on all Smart HR templates. If the Department Processor included an attachment on the template, click Open to view the attachment. In this example, no documents have been attached.</p> <p>The Department Approver can also view who the transaction was routed to for approval.</p> |  |

| Step | Action | Screenshot | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--------------------------|---|---|----------------|--------------------|---------------|----------------|--------------------|--------------|-----------|--------|--------------|--------------------------|-----------------|------|------------|-----------------|---------------|--------|--|-----------|--------------------------|-----------------|------|------------|-----------------|--------------|--------|--|--------------|--------------------------|-----------------|------|------------|-----------------|------------|--------|--|-----------|--------------------------|-----------------|------|------------|-----------------|------------|--------|--|-----------|--------------------------|-----------------|------|------------|-----------------|--------------|--------|--|-----------|
| 8 | <p>If the Department Approver has made any updates to the submitted template, click Save and Calculate to save the updates. Then click Cancel to return to the Manage Transactions page. The Cancel button does not cancel the transaction, but instead acts as a “back” button. <u>Do not</u> click the back button in the browser to return to the Manage Transactions page.</p> <p>If the Department Approver has <u>not</u> made any updates to the template and is ready to approve, click Cancel.</p> |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 9 | <p>Back on the Manage Transactions page, the Department Approver is ready to take action on the transaction:</p> <ul style="list-style-type: none"> • Approve: Click the Approve button to approve the Smart HR transaction. • Deny: Click the Deny button to deny the Smart HR transaction. Once denied, the template cannot be reopened. The Department Processor will need to submit a new template if updates to the employee’s data still need to be made. |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 10 | <p>Once the Smart HR template is approved by the Department Approver, the transaction status will change from <i>Pending</i> to <i>Approved</i>.</p> <p>The approved transaction is sent to the Payroll Department to be finalized in Job Data, and will be effective as of the Effective Date denoted in the template.</p> |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 11 | <p>Back on the Manage Transactions page, the transaction will continue to remain in <i>Action Required</i> status until the Payroll Department pushes it to Job Data. Once in Job, the status will update to <i>Completed</i>.</p> |  <table border="1"> <thead> <tr> <th>Select</th> <th>Transaction Type</th> <th>Request ID</th> <th>Effective Date</th> <th>Transaction Status</th> <th>Name</th> <th>Person ID</th> <th>Action</th> <th>Submitted By</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Change Job Data</td> <td>1084</td> <td>09/06/2016</td> <td>Action Required</td> <td>Robert Barney</td> <td>113388</td> <td></td> <td>Mary Mire</td> </tr> <tr style="border: 2px solid red;"> <td><input type="checkbox"/></td> <td>Change Job Data</td> <td>1123</td> <td>09/13/2016</td> <td>Action Required</td> <td>Connor Chang</td> <td>973764</td> <td></td> <td>Jessica King</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Change Job Data</td> <td>1090</td> <td>09/08/2016</td> <td>Action Required</td> <td>Liam Keefe</td> <td>019647</td> <td></td> <td>Mary Mire</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Change Job Data</td> <td>1091</td> <td>09/08/2016</td> <td>Action Required</td> <td>John Jones</td> <td>019647</td> <td></td> <td>Mary Mire</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Change Job Data</td> <td>1092</td> <td>09/08/2016</td> <td>Action Required</td> <td>Gloria Glove</td> <td>019647</td> <td></td> <td>Mary Mire</td> </tr> </tbody> </table> | Select | Transaction Type | Request ID | Effective Date | Transaction Status | Name | Person ID | Action | Submitted By | <input type="checkbox"/> | Change Job Data | 1084 | 09/06/2016 | Action Required | Robert Barney | 113388 | | Mary Mire | <input type="checkbox"/> | Change Job Data | 1123 | 09/13/2016 | Action Required | Connor Chang | 973764 | | Jessica King | <input type="checkbox"/> | Change Job Data | 1090 | 09/08/2016 | Action Required | Liam Keefe | 019647 | | Mary Mire | <input type="checkbox"/> | Change Job Data | 1091 | 09/08/2016 | Action Required | John Jones | 019647 | | Mary Mire | <input type="checkbox"/> | Change Job Data | 1092 | 09/08/2016 | Action Required | Gloria Glove | 019647 | | Mary Mire |
| Select | Transaction Type | Request ID | Effective Date | Transaction Status | Name | Person ID | Action | Submitted By | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Change Job Data | 1084 | 09/06/2016 | Action Required | Robert Barney | 113388 | | Mary Mire | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Change Job Data | 1123 | 09/13/2016 | Action Required | Connor Chang | 973764 | | Jessica King | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Change Job Data | 1090 | 09/08/2016 | Action Required | Liam Keefe | 019647 | | Mary Mire | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Change Job Data | 1091 | 09/08/2016 | Action Required | John Jones | 019647 | | Mary Mire | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Change Job Data | 1092 | 09/08/2016 | Action Required | Gloria Glove | 019647 | | Mary Mire | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |